

## **Visitor Survey Findings and Responses**

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**N = 240**

**1. Did you receive the Fredericksburg Area Tourism information sent to you earlier?**

Yes	66.38%
No	17.67%
Don't Remember	15.95%
No response	0.85%

Slightly more than two-thirds (66.38%) of respondents report they remember receiving the information. Slightly less than one-fifth (17.67%) report they do not recall receiving the information. And less than one-fifth (15.95%) do not recall whether they received the information or not. (N=238, .85% No response).

*Thus, the Fredericksburg Area Tourism can have confidence that respondents are answering the questions in this report based on remembering that they received the information.*

**2. Was there information you expected to receive, but didn't?**

Yes	9.93%
<b>No</b>	<b>90.07%</b>
No response	35.47%

***If yes, what was missing?***

- CITY / AREA MAP
- CIVIL WAR INFO.
- DETAIL DRIVING ROUTE INFORMATION TO GET TO PLACES
- HISTORY
- THOUGHT THERE WOULD BE COUPONS

The information requested by potential visitors to an area often does not meet or only partially meets their information needs. A substantial 90.07% responded No to this question, indicating that they had received the kind of information they expected. Slightly less than 10% reported their expectations were not met by the kind of information they received. A little more than one-third (35.47%) of the respondents did not answer the question. (N=151, 35.47% No response).

In this report, we see that the information sent to those who requested it did meet their expectations. This is a positive sign that Fredericksburg Area Tourism is meeting the information needs of potential visitors. However, one must also realize that although the majority of the respondents report that the information they received matched their expectations, as an industry we have trained the public to expect certain types of information. This does not necessarily mean that the information is as good as it can be. *It means that the information is similar to information they normally see about a destination.*

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### **3. *Did you ever travel to or through the Fredericksburg area before you received the information?***

Yes	44.08%
<b>No</b>	<b>55.92%</b>
No response	35.04%

This question was asked to determine if potential visitors made a trip to the Fredericksburg area prior to requesting information. Slightly less than three-fifths (55.92%) stated they had not traveled to or through the Fredericksburg area before receiving the information. A little more than two-fifths of the respondents (44.08%) stated they had traveled to the Fredericksburg area prior to receiving information. Approximately one-third of the total respondents (35.04%) did not respond to the question. (N=152, 35.04% No response)

The responses to this question indicate that a majority of respondents have never visited the Fredericksburg area, and therefore the information is targeting many new potential visitors to the area. However, a significant level of familiarity with the destination was reported by more than two-fifths of the respondents (44.08%) of the responses. This indicates that many travelers are requesting information from Fredericksburg Area Tourism to plan repeat visits to the area.

*Thus, Fredericksburg Area Tourism might capitalize upon its existing level of familiarity and also add significant numbers of new visitors through its tourism marketing efforts.*

### **4. *Did you travel to or through the Fredericksburg area after you received the information?***

Yes	28.76%
<b>No</b>	<b>71.24%</b>
No response	34.62%

This question was asked as a qualifying question to sort the potential visitors into those who made and those who did not make a trip to the area. Those who made a trip continued with more detailed questions about their trip; those who did not make a trip answered general demographic questions only. Slightly less than one-third (28.76%) did travel to the Fredericksburg area after they received the information, while slightly more than two-thirds (71.24%) did not choose to make the trip. Slightly more than one-third of the total respondents (34.62%) did not answer the question.

*Thus the expected conversion rate for the Fredericksburg area can be predicted to be just under the 29% level. Normally, RTM finds conversion rates in the 20-40% range. So, this 29% can be considered adequate.*

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### **5. How many times have you visited the Fredericksburg area since you received the information?**

Average Number of times = 1.43

73.81% of respondents that answered question #5 reported 1 time

### ***Circle the months during which you visited.***

Jan	1.71%
Feb	0.85%
Mar	0.85%
Apr	2.14%
May	2.99%
<b>Jun</b>	<b>3.42%</b>
<b>Jul</b>	<b>5.13%</b>
<b>Aug</b>	<b>5.56%</b>
<b>Sep</b>	<b>3.42%</b>
Oct	0.43%
Nov	0.85%
Dec	0.43%
No response	81.62%

This question was asked to discern how many trips resulted from the visitor information distributed by Fredericksburg Area Tourism and to document the months of visitation by inquirers. The respondents report that the months with highest visitation to the Fredericksburg area were the summer months of June through September. The winter months had the lowest visitation.

This information somewhat matches information provided by the State of Virginia for general visitation to the northern Virginia area. Traditionally summer and fall have been the highest visitation seasons, with winter the lowest. The low visitation in the autumn months indicates a great opportunity for future promotion of leaf season visitation. National trends tell us that off-season visitation to rural regions is growing as the typical consumer is taking more frequent, short-term vacations to escape urban areas. Also, there appears to be mixed results here indicating that perhaps various local events or functions may account for some of the visitation patterns.

*Thus, Fredericksburg Area Tourism needs to examine local event and visitation patterns and develop strategies for increasing visitation where possible.*

## Visitor Survey Findings and Responses

### **6. Regarding the information you received, what do you remember liking or disliking the most about it? (write in your answers)**

#### **Information Likes Of Survey Respondents**

- **ACCOMMODATIONS (2)**
- AREA COVERAGE & EVENTS
- ATTRACTIONS
- BEAUTIFUL AREA
- **CIVIL WAR BATTLEFIELDS**
- **CIVIL WAR INFO (3)**
- CLEAR, USEFUL INFORMATION
- **COLORFUL**
- **COLORFUL** BROCHURES
- DESCRIPTION OF HOMES
- DESCRIPTIONS OF ITEMS
- **EASY TO USE**
- EVERYTHING
- FREDERICKSBURG & STRAFFORD COUNTY ATTRACTIONS
- GENERAL BRODMERE
- GOOD PRESENTATIONS
- **GREAT GENERAL INFORMATION (2)**
- **HISTORIC** DOWNTOWN
- **HISTORIC SITES (2)**
- **HISTORICAL** INFO
- **HISTORICAL, CIVIL WAR** INFORMATION
- **INFORMATIVE (3)**
- IT WAS VERY ORGANIZED
- LOTS TO SEE
- MANY RESTAURANTS
- MANY THINGS TO DO WAS LISTED
- **MAP** OF ATTRACTIONS
- **MAP** OF **HISTORIC** AREA
- **MAPS (4)**
- **MUSEUMS (2)**
- NICE PEOPLE
- PICTURES
- PRESENTATION
- RESORTS
- SCENERY
- SCHEDULES
- SIGHTS TO SEE (2)
- THE FORMAT
- THE TOURS, SHOPPING & JUST ABOUT EVERYTHING THERE
- THERE WAS SO MUCH OF IT
- TIMESHARE
- TOWN CHARACTER
- UNDERSTANDABLE
- VARIETY
- **DETAILED/THOROUGH/ SPECIFIC/ ACCURATE/ CONCISE (5)**

#### **Information Dislikes Of Survey Respondents**

- CALENDAR OF EVENTS - UPDATED
- FEW **MAPS** OF DOWNTOWN
- HISTORIC HOMES
- LACK OF CAMP GROUND INFO. FOR RV ACTIVITIES / CAMPING (2)
- MORE DETAILED / ACCURATE **MAPS** PLEASE!!!
- MOTELS - HOTELS
- NOT ENOUGH ON HIKING
- NOT ENOUGH ON WALK TOURS
- NOT ENOUGH **RESTAURANTS**
- **NOTHING (2)**
- **RESTAURANTS**
- SOME INFORMATION WASN'T DETAILED
- WEATHER

This question was asked to determine which information is most important to potential visitors, and how well Fredericksburg Area Tourism is meeting these needs. The same items are often listed as likes and dislikes. Every respondent has a different level of expectation and therefore the same map can be satisfactory to one person and inadequate to others.

*Thus, Fredericksburg Area Tourism can be assured that it is providing an appreciated information service. Also, Fredericksburg Area Tourism now has evidence of what potential visitors would most like to see in revised, updated visitor information.*

## Visitor Survey Findings and Responses

### **7. Where did you find out about the information packet? The TOP SIX are in bold.**

Guides – AAA Tourbook	6.41%
Internet – Virginia Tourism web site	4.27%
Brochures – Fredericksburg Area Tourism	4.27%
Guides – <b>Virginia State Travel Guide</b>	3.42%
Guides – <b>Guide to Virginia's Civil War</b>	3.42%
Internet – <b>Fredericksburg web site</b>	3.42%
Magazines – Reader's Digest	2.99%
Magazines – Family Circle	2.14%
Newspapers – USA Weekend Sun. Mag. (found in your newspaper)	2.14%
Brochures – Spotsylvania County Brochure	2.14%
Welcome Center – Virginia Welcome Center (I-95)	2.14%
Welcome Center – Fredericksburg Visitor Center	2.14%
Other (specify)	1.71%
Magazines – Ladies Home Journal	1.28%
Newspapers – Newspaper travel features	0.85%
Welcome Center – Spotsylvania County Visitors Center	0.85%
Magazines – Better Homes & Gardens	0.43%
Newspapers – Adv. Inserts in newspapers	0.43%
Magazines – New Choices	0.00%
Welcome Center – Virginia Welcome Center (I-64)	0.00%
Welcome Center – Virginia Welcome Center (I-85)	0.00%

Listed as "Other":

- **AAA Magazine**
- **Blue Ridge Country**
- **Motor Home Magazine**
- **Virginia Civil War Trails Web Site**

It is useful to know where potential visitors find out about travel information packets. This information will help with the planning of future marketing strategies.

According to Travel Industry of American (TIA) national surveys have identified the following as the most preferred sources of information about travel destinations:

- Recommendations by friends and family
- State travel guides
- Brochures
- Magazines
- Newspapers
- TV
- Internet

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### **7. (Cont'd)**

The most frequently mentioned source (6.41%) in the Fredericksburg area study is the AAA Tour Book. It is not unusual to see AAA rank in the 5% – 10% range. Also, it should be noted that the study does not reveal whether AAA tourbook editorial or advertising was the source for response. In most similar research studies conducted by RTM the state travel guide has traditionally been the top source that visitors list for source of information about a particular destination and has only recently been surpassed by the Internet. In this study the Virginia web site came in second, the Fredericksburg Area Tourism brochure came in third and the State Travel Guide came in fourth. However, we have seen the Internet's response rate increasing over the past few years and in the last year the Internet has been the number one source of information in most of the studies RTM has completed.

The Fredericksburg Area Tourism Visitor Guide had a response of 4.27% and ranked third as an information source. In comparison with other similar destinations we have studied and comparing to national data this percentage is good, and given the brief marketing history of F.A.T. this is also remarkable.

*Thus, the AAA Tour Book, the Virginia web site, the Virginia State Travel Guide and the Fredericksburg area brochure are prime sources for visitor interested in the Fredericksburg area. Additionally, we see that Fredericksburg Area Tourism must place high emphasis on developing an improved outreach strategy to generate increased inquiries from its primary brochures and Internet presence.*

### **8. How many nights did you spend in the Fredericksburg area?**

Typical responses = 0 to 3, Average number of nights = 2.73

The average length of time visitors stay in an area is a useful piece of information when planning marketing strategies. The majority of the responses to this question represented one to three night stays with the average of 2.73 nights reported.

The responses here are comparable to what RTM typically finds in small to medium sized towns and rural areas. This tells us that visitors either plan weekend getaways or short stays based on getaways, visiting friends and relatives, or local activities.

*Thus, we see here that Fredericksburg Area Tourism can have confidence in its product as having appeal for a two to three night stay. Future product development and effective promotion of additional activities in the area will drive longer lengths of stays.*

## **Visitor Survey Findings and Responses**

**9. What was the main purpose of your last visit to the Fredericksburg area?**  
**(Circle main purpose or reason for your visit) The TOP SIX responses are in bold.**

<b>Civil War History</b>	<b>35.29%</b>
<b>Visit friends / relatives</b>	<b>17.65%</b>
<b>Vacation / getaway</b>	<b>17.65%</b>
<b>Overnight as part of a longer trip</b>	<b>14.71%</b>
<b>Attend a festival / event</b>	<b>5.88%</b>
<b>Outdoor recreation day trip</b>	<b>5.88%</b>
Rev. War / Colonial History	2.94%
Meeting / convention	0.00%
Business	0.00%
Golf	0.00%
Relocation	0.00%
Sports event	0.00%
Fishing / boating	0.00%
Hiking / biking	0.00%
Antique shopping	0.00%
Other (specify)	0.00%

The primary purpose of a trip is often a key around which promotional messages can be developed.

Here we see the largest percentage (35.29%) reported Civil War History as the primary trip purpose. Additionally, the large percentage of visitors coming to see friends and relatives (17.65%) and a vacation / getaway (17.65%) indicates that the Fredericksburg area does have appeal as a vacation or getaway destination. The large number of people who indicated that they were overnighing as part of a longer trip (14.71%) confirms what was expected based on the location of the Fredericksburg area along I-95, however this also confirms the number of people that used the F.A.T. information to make that lodging decision. Obviously, the interstate highway drives occupancy as part of a longer trip, but this is a market worth targeting. Immediate tax revenue increases can be obtained from this overnight market and long term gains can be achieved by marketing the county for a return visit to these overnighers.

*This tells us that the Fredericksburg area can have confidence that it is perceived to be a potential getaway and vacation destination, as well as a good overnight stopping point. Thus, people are predisposed to visit based on the current activity offering. Civil War history, visiting friends and relatives, a vacation getaway and overnighing as part of a longer trip are clearly identified in this study as the main purposes for current visitation.*

## Visitor Survey Findings and Responses

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**10. What type of lodging did you use most during your last visit? (circle one)  
The TOP THREE are in bold.**

<b>Hotel</b>	<b>32.50%</b>
<b>Motel</b>	<b>32.50%</b>
<b>Friends / family house</b>	<b>15.00%</b>
Bed & breakfast	7.50%
Other (specify)	7.50%
Campground	5.00%
Rental cabin / cottage	0.00%
Inns (20 rooms or more)	0.00%

**Other:**

- Drive through
- Timeshare

Awareness of the types of lodging used by visitors will help Fredericksburg Area Tourism track and document the impact of its marketing efforts for its lodging constituents.

In this study, the largest percentage of respondents reported staying in a hotel (32.50%) or motel (32.50%). Friends or family houses were the next largest category of overnight choices (15.00%).

This information matches what RTM typically finds. Generally we find that the majority of tourists prefer a hotel or motel.

A 1998 study by *D. K. Shifflet & Associates* for the *American Hotel and Motel Association* found that 67% of all visitor expenditures were driven by leisure travelers and 33% by business travelers.

*The findings in this study reveal that leisure travelers prefer hotels and motels when not staying with friends and relatives. Thus, leisure travelers as well as business travelers are prime target markets for hotels and motels in the Fredericksburg area.*



## **Visitor Survey Findings and Responses**

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### **11. Including you, how many people went on the trip?**

Adults:	Typical response = 2 Average number of adults = 2.35 Percentage of visitors traveling with adults only = 67.44%
Children:	Typical response = 1 or 2 Average number of children = 1.93 Percentage of visitors traveling with children = 32.56%

An important part of a visitor profile is the size of the group visiting an attraction or a destination.

The typical response in this study was a travel party size of 2 adults. Families traveling with children typically listed 1-2 children in their travel party.

Overall, 67.44% of respondents reported their travel party was comprised of only adults. Less than one-third, or 32.56% of travel parties contained children. Nationally, Travel Industry of America (TIA) reports that family vacation travel accounted for 72% of all vacation trips in 1998. While this number differs with the Fredericksburg area research an explanation can be found in the lack of children oriented products offered in the Fredericksburg area. A family in a station wagon visiting historic was once a part of the American experience. The American family vacation has changed in the past decade and children who have become accustomed to highly interactive technology at home and at school are easily bored at historic sites that offer little interactivity. Parents seek out vacations that will provide “edutainment” for their children.

*Currently the Fredericksburg area is more successful in attracting adult travel parties without children. This reflects the change in the American family vacation over the last thirty years. Family vacations used to have a much stronger educational component than today. Families seek out educational opportunities now only when they offer an entertainment or interactive component. Many aquariums, zoos and historic sites like Williamsburg have learned that their educational venue must sell entertainment to attract families.*

*Thus, we can conclude that Fredericksburg Area Tourism should place the greatest emphasis in the short term on marketing itself to adult travel parties and begin to strategically build awareness of the activities that are available for families with children. Local attractions, museums, historic sites and activities must begin the process of retooling their facilities to meet the needs of traveling families.*

## **Visitor Survey Findings and Responses**

### **12. Please estimate how much you spent during your last trip to the Fredericksburg area:**

	<b>Highest Amount</b>	<b>Lowest Amount</b>	<b>Average Amount</b>
Food/Meals	\$1500.00	\$10.00	\$240.61
Lodging	\$1500.00	\$0.00	\$230.64
Trans., fuel, airfare, etc.	\$1000.00	\$20.00	\$156.05
Attractions/Amusements	\$1500.00	\$10.00	\$141.32
Shopping	<u>\$500.00</u>	<u>\$20.00</u>	<u>\$110.69</u>
<b>TOTAL</b>	<b>\$3700.00</b>	<b>\$40.00</b>	<b>\$716.90</b>

Knowledge of the spending habits of those who travel to the Fredericksburg area will benefit Fredericksburg Area Tourism in projecting realistic revenue growth in the future. The above figures, when combined with the average length of stay information (question #8), provide insight into the economic impact that each travel party generates in a community.

As found in question #8, the average length of stay in Fredericksburg Area is 2.73 nights. Therefore, dividing the average amount spent while in the area by the average number of nights determines the average daily expenses in each category. Using this formula, the typical travel party spent the following amounts each day:

<b><u>Category</u></b>	<b><u>Amount</u></b>	<b><u>% of whole</u></b>
1. Food/Meals	\$88.14	27.36%
2. Lodging	\$84.48	26.23%
3. Transportation/Fuel	\$57.16	17.75%
4. Attractions/Amusements	\$51.77	16.07%
5. Shopping	<u>\$40.55</u>	<u>12.59%</u>
<b>Average Daily Expense</b>	<b>\$322.11</b>	<b>100.00%</b>

These dollar figures are relatively similar to those found in research studies throughout the south and reflect travel habits identified in research conducted by TIA. Of some surprise is the ranking of the expenditures by category. The largest daily expense (27.36%) for travelers to the Fredericksburg area is dining, which usually ranks third or fourth after lodging and shopping. The high ranking of dining as an expenditure is a reflection of the wide array of fine dining available in Fredericksburg.

The second highest expense (26.23%) is lodging. Third is transportation / fuel (17.75%) and the dollar amount is typical for southeastern travel patterns. Attractions / amusements is rated fourth (16.07%).

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### **12. (Cont'd)**

The only unusual thing we see here is the shopping category. It is shocking for shopping to be listed as the smallest expenditure at 12.59% of average daily expenditures. Normally, we find shopping to be a larger expenditure than food/meals, and often we find it to be the number one expenditure. Shopping is identified nationally as the number one tourist activity. One will also see in the next question below that shopping is the number five tourist activity for visitors to the Fredericksburg area after visiting historic sites a/ battlefields, driving/sight seeing. When we do find shopping to be the largest expenditure, we can be sure that the destination is taking maximum advantage of economic impact opportunities.

The findings here indicate that the Fredericksburg Area Tourism might do more to promote shopping venues to visitors and to encourage development of more unique shopping opportunities for tourists. This research confirms our observation in downtown Fredericksburg that large numbers of people were shopping but few were buying. Future research should be conducted to determine what products would be of appeal to the people visiting downtown.

*The Fredericksburg area can have confidence in the level of average daily spending reported by visitors. Future marketing efforts should include an emphasis on the shopping highlights of the area as a reason to visit and extend the stay. Additionally, Fredericksburg Area Tourism should encourage local businesses to develop a different product mix in local stores for visitors to most effectively grow per visitor expenditures.*

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- 13. The following is a list of activities that people may do while visiting Fredericksburg area. Please circle all activities that at least one member of your travel party did while visiting. (The TOP TEN activities are in bold.)**

<b>Visit a historic site</b>	<b>15.81%</b>
<b>Visit historic downtowns</b>	<b>14.96%</b>
<b>Driving / sightseeing</b>	<b>14.96%</b>
<b>Visit a battlefield</b>	<b>14.10%</b>
<b>Shopping</b>	<b>13.68%</b>
<b>Visit a museum</b>	<b>12.82%</b>
<b>Antique shopping</b>	<b>8.97%</b>
<b>Visit a state park</b>	<b>5.98%</b>
<b>Visit an art gallery</b>	<b>4.70%</b>
<b>Carriage / trolley ride</b>	<b>3.42%</b>
Visit a winery	2.14%
Golf	1.71%
River / nature tours	1.71%
Attend a festival / event	1.71%
Attend cultural events	1.71%
Camping	1.28%
Biking	1.28%
Boating / fishing	0.85%
Meeting / seminar	0.85%
Business	0.00%

In assessing the overall perceptions of product value, it is important to note the activities in which visitors participate. This also provides clues as to which marketing messages might be most successful. In other research studies conducted by RTM in the Southeast we find similar responses to the data presented here. Frequently mentioned activities in other similar studies include shopping, sightseeing and spending time in the downtown area.

This information combined with the responses to questions 9, 15, 16, and 17 helps identify potential positioning for future tourism promotion in the Fredericksburg region. Historic sites and historic downtowns, driving/sightseeing, historic battlefields, shopping and visiting a museum rated highly here.

## **Visitor Survey Findings and Responses**

### **13. (Cont'd)**

According to RTM research and as also documented by Travel Industry of America (TIA), activities participated in by U.S. resident travelers for 1998 included:

- Shopping (33%)
- Outdoor (camping, hiking, biking, etc.) (17%)
- Historical Sites/Museums (15%)
- Beaches (11%)
- Cultural Events/Festivals (10%)
- National/State Parks (9%)
- Theme/Amusement Parks (8%)
- Nightlife/Dancing (8%)
- Gambling (7%)
- Sports Event (6%)
- Golf/Tennis/Skiing (4%)

Additionally, TIA reports that visitors planned the following activities after arriving at their destination:

- Restaurant (48%)
- Shopping Area (45%)
- Museum or Exhibit (26%)
- Sightseeing Tour (24%)
- Movie (16%)
- Theme Park (15%)
- Religious Service (14%)
- Live Theatre or Other Performance (14%)
- Festival or Parade (13%)
- Other Activities/Attractions (24%)

The information learned in the Fredericksburg area study compares favorably with the data learned nationally and at the state level. *Thus, Fredericksburg Area Tourism can have confidence that promotion of its historic sites, sightseeing, battlefields, walking/driving tours, downtown, museums and overall outdoor activities will appeal to potential tourists.*

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**14. Overall, on a 5 point scale (where 5 is Excellent, 3 is Average, and 1 is Poor), how would you rate your last visit to the Fredericksburg area?**

5 (Excellent)	<b>47.73%</b>
4	<b>43.18%</b>
3 (Average)	9.09%
2	0.00%
1 (Poor)	0.00%
No response	81.20%
<b>Average Rating = 4.39</b>	

The rating of a visit to an attraction or a destination by visitors is useful in understanding if visitor expectations are being met by actual experiences. Further, it provides a clue to likelihood of return/repeat visits in the future. It is also a good measure of how well visitors will speak of the Fredericksburg area to their friends and relatives.

It is important for Fredericksburg Area Tourism to realize that typically a visitor rates their vacation experiences highly. Vacations, perhaps even in foul weather or less-than-desirable conditions are still appreciated by visitors compared to their normal hectic lives. Therefore, one must look very critically at the ratings provided here.

RTM prefers to see a solid "A " (or upwards of a 4.5) rating for destinations. Ratings over this mark confirm for us that the destination or attraction is providing excellent value and is well positioned with expectations matching actual experiences. When we find ratings below the "A" or 4.29 mark, we see this as an indication that the value of the destination/attraction needs to be examined.

*Thus, we can deduce that the Fredericksburg area earns good ratings from its visitors but could do better. The Fredericksburg area has an opportunity to increase the overall satisfaction of tourists.*

## Visitor Survey Findings and Responses

### **15. Regarding your last trip to the Fredericksburg area, what do you remember liking or disliking the most? (write in your answers)**

#### Top Reported Likes

- ALL QUESTIONS WERE ANSWERED
- ANTIQUES / SHOPPING
- APOTHECARY SHOP
- **ATMOSPHERE (2)**
- ATTRACTIONS
- BEAUTIFUL SCENERY
- CAMPING
- **CIVIL WAR SITES/BATTLEFIELDS (7)**
- CIVIL WAR STUFF
- **CLEAN CITIES**
- **CLEANLINESS**
- **CLEANLINESS** OF THE PARKS, HISTORICAL SITES
- CLOSE PROXIMITY OF ATTRACTIONS
- COLONIAL RECONSTRUCTIONS IN TOWN
- CUSTOMER SERVICE OF THE BUSINESSES
- EASE OF GETTING AROUND
- **EVERYTHING (2)**
- FREDERICKSBURG AREA MUSEUM (EXCELLENT GUIDES)
- **FRIENDLY AREA**
- **FRIENDLY PEOPLE** IN ALL ATTRACTIONS
- GENERAL AMBIENCE OF FREDERICKSBURG
- GOOD FOOD
- **GUIDES AND DEMONSTRATIONS AT HISTORIC SITES**
- **GUIDES AT HISTORIC AREAS REALLY KNEW THEIR STUFF**
- **HELPFUL PEOPLE**
- **HISTORIC ASPECT**
- **HISTORIC DOWNTOWN (3)**
- **HISTORIC SIGHTS**
- **HISTORIC SITES (3)**
- **HISTORY**
- **HISTORY / CIVIL WAR**
- LOCAL HOSPITALITY
- MERRIMAN'S RESTAURANT
- MUSEUMS
- NICE PEOPLE
- **PEOPLE (3)**
- RELAXING ATMOSPHERE
- **RESTAURANTS (2)**
- **SCENERY / VIEW (4)**
- SEEING FAMILY
- **SHOPPING (3)**
- SITE SEEING
- THE RIVER
- THE SOUTHERN HOSPITALITY
- THERE'S A LOT TO DO
- TOWN OF FREDERICKSBURG
- VISITING HISTORIC SIGHTS
- **WEATHER (2)**
- WINERY - DIDN'T VISIT BUT WILL NEXT TRIP

#### Top Reported Dislikes

- DIVIDED **HIGHWAYS**
- FOOD
- **HIGHWAY CONGESTION**
- HISTORIC AREA - BUILT UP
- **HUMIDITY**
- KENMORE INN
- LACK OF LOCAL PUBLIC TRANSPORTATION
- **NAVIGATING DOWNTOWN**
- NEED MORE EVENTS AT NIGHTTIME
- **NOTHING (3)**
- POOR SHAPE OF THE HIGHWAYS
- POOR VISIBILITY IN SHENANDOAH MTNS DUE TO POOR AIR
- POSSIBLY MORE ACTIVITY BY WATER
- **RAINED**, COULDN'T DO MUCH OUTSIDE CAR WHEN STARTED
- SO MUCH TO SEE & NOT ENOUGH TIME!
- THE **WEATHER** - WE HAD TO LEAVE EARLY
- **TRAFFIC (4)**

## **Visitor Survey Findings and Responses**

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### **15. (Cont'd)**

Knowledge of the characteristics or attributes which visitors liked and disliked about their visit is useful information in assessing product quality, to provide to local tourism entities for corrective measures, and for developing new promotional messages.

*These findings must be compared to those found in questions 9, 13, 16 and 17 to reach a full understanding of the primary attractors that bring people to the area and should thus be used in future marketing positioning. Clearly, historic sites, Civil War sites, Fredericksburg, friendly people, scenery, and the museums offer appeal to visitors. The dislikes primarily included wayfinding, traffic and the weather.*



## Visitor Survey Findings and Responses

**16. Following is a list of attractions and events offered in the Fredericksburg area. First, check (✓) those that you visited & rate from 5 to 1, (5 is Excellent, 3 is Average, and 1 is Poor). Second, check those you heard of & didn't visit, and then check those you have never heard of.**

<u>Attractions</u>	<u>Visited</u>	<u>Rating</u>	<u>Heard of</u>	<u>Never heard</u>
Belmont	2.14%	4.80	8.55%	2.56%
Chatham	4.27%	5.00	7.69%	2.56%
<b>Fredericksburg Area Museum &amp; Cultural Center</b>	<b>12.39%</b>	<b>4.52</b>	<b>4.70%</b>	<b>0.00%</b>
<b>Civil War Battlefields</b>	<b>14.96%</b>	<b>4.52</b>	<b>2.56%</b>	<b>0.00%</b>
George Washington's Ferry Farm	2.56%	4.60	11.11%	1.28%
Lake Anna State Park	2.99%	4.29	7.69%	3.85%
Hugh Mercer Apothecary Shop	3.85%	4.89	5.98%	0.43%
James Monroe Museum	4.70%	4.45	8.97%	1.28%
Historic Kenmore	4.27%	4.80	8.55%	1.28%
Mary Washington College and Galleries	2.14%	4.00	10.68%	1.28%
Mary Washington House	3.85%	4.78	8.55%	2.14%
George Washington Masonic Lodge Museum	0.85%	5.00	9.83%	2.99%
National Bank Museum	0.43%	5.00	7.26%	5.56%
Rising Sun Tavern	5.13%	4.67	5.98%	3.42%
Riverside Dinner Theater	1.71%	5.00	4.27%	6.84%
<b>Spotsylvania Courthouse &amp; Historic District</b>	<b>8.12%</b>	<b>4.67</b>	<b>5.98%</b>	<b>0.85%</b>
Spotted Tavern Winery & Cider Mill	1.71%	4.50	5.98%	5.13%
<b>Historic Downtown Fredericksburg (shops, etc.)</b>	<b>15.81%</b>	<b>4.60</b>	<b>1.28%</b>	<b>0.00%</b>
White Oak Museum	1.28%	5.00	5.13%	6.84%
All American Carriages	0.85%	4.50	4.27%	8.12%
Living History Experience	1.28%	5.00	6.41%	5.56%
Trolley Tours of Fredericksburg	2.99%	5.00	9.83%	1.71%
<b>Central Park (shopping, dining, entertainment)</b>	<b>8.12%</b>	<b>4.47</b>	<b>5.98%</b>	<b>2.56%</b>
Belvedere Plantation	1.71%	5.00	7.69%	3.85%
Central Park Funland	0.85%	4.00	4.70%	7.69%
Fredericksburg Ice Park	0.43%	4.00	4.70%	8.55%
Putt Putt Golf & Games	1.28%	4.33	3.85%	8.12%
Civil War Walking Tour	5.56%	4.33	8.55%	1.71%
Rappahannock Ecotourism Tours	0.00%	NR	4.27%	8.55%
Old Town Falmouth	1.71%	4.75	7.26%	5.13%
Lake Anna Winery	1.28%	5.00	5.13%	6.84%
River Cruise "City of Fredericksburg"	2.14%	4.80	5.98%	4.70%
Hartwood Winery	1.28%	4.67	5.13%	6.84%
Winery Tours	1.28%	5.00	7.69%	4.27%
Walking History / Architecture Tour (Self-Guide)	5.13%	4.58	5.98%	3.42%

## **Visitor Survey Findings and Responses**

### **16. (cont'd)**

Awareness level, compared to the percentage of attendance and the rating of each attraction and event tells us a great deal about how visitors appreciate these individual attractions and events. It also provides critical clues for the most effective positioning for the Fredericksburg Area Tourism.

In analyzing this data one wants to see a relatively high awareness level (above 3%). Visitation percentages tell us how much appeal the attraction currently enjoys among visitors. Here we want to see a percentage in high proportion to the awareness level. Otherwise one might conclude that although the visitor is aware of the product, they are not compelled to visit, or perhaps the event / attraction is not available when they visit. Finally, one wants to note the rating of the attraction/event. This provides clues as to the perceived quality of the experience and whether an individual attraction/event may or may not be of critical importance for the majority of visitors. RTM looks for an overall rating of over 4.5 or "A" grade in determining high product quality.

The Fredericksburg Area attractions/events with the top awareness level include (in rank order):

- Historic Downtown Fredericksburg (shops etc.)
- Civil War Battlefields
- Fredericksburg Area Museum & Cultural Center

The most frequently visited/participated in attractions/events include (in rank order):

- Historic Downtown Fredericksburg (shops etc.)
- Civil War Battlefields
- Fredericksburg Area Museum & Cultural Center

The attractions/events with an acceptable level of awareness, relatively high visitation and the top rating over or near a 4.5 (excellent) include (in rank order):

- Historic Downtown Fredericksburg (shops etc.)
- Civil War Battlefields
- Fredericksburg Area Museum & Cultural Center

These responses must be compared to those responses to questions 9, 13, 15, and 17 to arrive at an effective positioning for Fredericksburg Area Tourism. Those questions identify main purpose of visit, activities participated in, likes and dislikes, and unmet needs of the respondents.

One trend that caught our attention is the large number of sites and attractions that have high awareness levels but low attendance levels and relatively low satisfaction ratings. This might mean that many of these activities are unavailable during primary visitation times. Since such a small percentage of visitors actually visited these attractions/activities, the ratings might be a little suspect.

## **Visitor Survey Findings and Responses**

### **16. (Cont'd)**

RTM has noted in bold the attractions and events that, in our analysis, have the most compelling appeal for visitors. We come to this conclusion by identifying a good percentage of awareness (approximately 3% or higher), a healthy percentage of actual visitation, and a high rating of quality of experience.

Please note that we do not typically rate annual events as offering top appeal because they offer only a limited time economic impact. For instance Augusta, GA may be well known for the Masters golf event, but it can't be counted upon for overall year round economic impact.

## Visitor Survey Findings and Responses

**17. What type of attractions or activities would you participate in if offered in the Fredericksburg area? (circle the number of ALL that interest you). The TOP responses are in bold.**

Civil War Reenactments	<b>70.94%</b>
Arts & crafts festival	<b>64.53%</b>
George Washington Museum	<b>63.68%</b>
Multi-entertainment complex with hotels/shops/attractions	<b>56.84%</b>
Antique trail	<b>54.27%</b>
1-man shows: Robert E. Lee, Ulysses S. Grant, Geo. Wash.	<b>48.72%</b>
River ecology excursions	36.32%
Jazz Club	17.09%
African American history trail	17.09%
Golf trail	12.39%
Other (specify)	8.97%

### **Other (specify):**

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• CIVIL WAR ACTIVITIES</li> <li>• COZY CABINS IN WOODS - SLEIGH RIDES - HAYRIDES...</li> <li>• GENEALOGY</li> <li>• HISTORICAL SITES</li> <li>• HISTORY</li> <li>• HOME TOURS</li> <li>• HORSE TRAILS</li> <li>• JUST DRIFTING</li> <li>• MASONIC LODGE MUSEUM / RIVER CRUISE / TROLLEY TOUR</li> <li>• MUSEUM</li> </ul> | <ul style="list-style-type: none"> <li>• MUSEUMS &amp; HOMES WITH HISTORY</li> <li>• MUSIC</li> <li>• OTHER HISTORIC ACTIVITIES I.E. FREDERICKSBURG SPECIFIC HISTORY</li> <li>• REV. WAR</li> <li>• SEMINARS</li> <li>• SHOPPING, GARDENS, TEA ROOMS</li> <li>• VISITING HISTORIC SITES</li> <li>• WALKING / HIKING TRAILS</li> </ul> |
|--|---|

Knowing the unmet needs or types of attractions/events/activities, which will draw visitors to an area is powerful information for Fredericksburg area to use in economic development and tourism product enhancement efforts. The top five attractions and activities that tourists would like to see added in Fredericksburg area are identified above.

RTM finds it interesting that some of the “new, desired products” in this case reflect the most appreciated existing products including antiques and events related to historic sites.

Also, one should note the very high percentages of appeal for the top five items identified in this question. Anything rated over a 40% mark is considered extremely attractive to visitors.

*Thus, strategic development and placement of these activities in Fredericksburg area will most likely result in increased visitor appeal.*

## **Visitor Survey Findings and Responses**

### **18. Are you planning to visit Fredericksburg Area in the next year?**

<b>Yes</b>	<b>70.75%</b>
No	29.25%
No response	9.40%

***If Yes, what month(s) do you plan to visit? (circle the number of each month you plan to visit)***

Jan	1.71%	<b>Jul</b>	<b>16.24%</b>
Feb	3.85%	<b>Aug</b>	<b>10.26%</b>
Mar	2.56%	Sept	6.84%
<b>Apr</b>	<b>10.68%</b>	<b>Oct</b>	<b>11.97%</b>
<b>May</b>	<b>14.10%</b>	Nov	6.84%
<b>Jun</b>	<b>15.81%</b>	Dec	4.70%

No response    38.46%

More than two-thirds (70.75%) of visitors report they plan to visit the Fredericksburg area within the next year. 29.25% indicate they will not. RTM looks to this data to indicate overall satisfaction with the visit and for a commentary as to whether the product offering is broad enough to warrant repeat visitation. A 70.75% positive response is very good. However, RTM prefers to see an affirmative response to this question in the range of 75% or higher. Again, this indicates to us the ideal satisfaction level with the product.

The high percentage of those who indicate a willingness to visit in the coming year when combined with actual conversion rate of those who had already visited (28.76% as identified in question #4) indicates that the promotional materials developed by Fredericksburg Area Tourism are doing a good job of driving increased visitation.

The months reported as most likely for repeat visits include summer and autumn followed by early spring and winter being less likely. This is similar to patterns we normally find. This also represents an opportunity to inform current visitors regarding reasons to come back during the identified target months. Off-season promotions will increase visitation in the less popular months.

## **Visitor Survey Findings and Responses**

### **19. What mode of transportation did you use to visit the Fredericksburg area? (circle one)**

<b>Automobile only</b>	<b>80.77%</b>
Motorcoach	10.90%
Other (specify)	4.49%
Combination fly / drive (if yes, what airport did you fly into?)	3.85%

#### **Other (specify):**

- |                               |                                  |
|-------------------------------|----------------------------------|
| • <b>BALTIMORE (2)</b>        | • RV VEHICLE WOULD BE USED       |
| • <b>DULLES - WASH DC (2)</b> | • SCHOOL TRIP ON BUS             |
| • NORFOLK                     | • <b>TRAIN (2)</b>               |
| • NOT SURE                    | • TRUCK                          |
| • RALEIGH / DURHAM            | • VANDALIE OH                    |
| • RICHMOND                    | • <b>WASHINGTON NATIONAL (3)</b> |

The responses to this question are used to determine the method of transportation used by visitors to the area and therefore indicate the best outreach methods to reach these audiences.

Respondents to the survey overwhelmingly indicated automobile only (80.77%) as their primary mode of transportation. We were surprised by this high rate of response when compared to the responses to the point of origin inquiry (question #23) that indicate that respondents are coming from all over the United States. While the Fredericksburg area does not have major airport connections in the immediate vicinity, the three large international airports in the metro Washington area were anticipated to have a greater impact on visitation by the research team.

*The responses to this question clearly indicate that visitors to the area are traveling primarily in automobiles and therefore require excellent maps and wayfinding tools to use as they navigate the two counties and the city that comprise the Fredericksburg Area Tourism region.*

## **Visitor Survey Findings and Responses**

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### **Demographics**

Demographics are the descriptive statistics dealing with a specific population of people. The demographics of visitors are excellent descriptions of the markets that are visiting an attraction or destination. The demographics of the sample of respondents who requested information about the Fredericksburg area are described in the following information.

#### **20. Education? (circle one)**

Grade school	0.43%
Some high school	0.87%
<b>High school graduate</b>	<b>22.08%</b>
Technical school	4.76%
<b>Some college</b>	<b>24.24%</b>
<b>College degree</b>	<b>25.54%</b>
<b>Graduate school</b>	<b>21.21%</b>
Other (specify)	0.87%

The largest percentage of respondents reported having a college degree (25.54%), or having some college (24.24%) followed by those who had graduated high school (22.08%) or attended graduate school (21.21%). In general, the respondents were fairly well educated which is typical of the traveling public.

#### **21. What is your age and gender?**

Ages ranged from 16 to 98. Average = 51.08  
Males comprised 36.73% of respondents; females 63.27%.

Nearly one-third (63.27%) of respondents were female while slightly more than one-third (36.73%) were male. Typically RTM finds more female trip planning decision-makers than male which is also typical of most national tourism studies.

The average age of respondents is 51.08 years. This also matches data for other similar areas in which Randall Travel Marketing has conducted research.

## Visitor Survey Findings and Responses

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**22. What is your occupation? (circle one)**

*The TOP TEN responses are in bold.*

<b>Retired</b>	<b>25.68%</b>
<b>Homemaker</b>	<b>12.61%</b>
<b>Management</b>	<b>8.11%</b>
<b>Professional</b>	<b>8.11%</b>
<b>Other (specify)</b>	<b>8.11%</b>
<b>Self employed</b>	<b>7.21%</b>
<b>Medical / health</b>	<b>5.41%</b>
<b>Government</b>	<b>5.41%</b>
<b>Educator</b>	<b>4.95%</b>
<b>Clerical</b>	<b>3.15%</b>
Student	2.70%
Sales	2.25%
Computer / technical	1.80%
Military	1.35%
Service	1.35%
Laborer	0.90%
Tradesman / machine operator	0.90%
Arts / music	0.00%
Craftsperson	0.00%

The data reported here tends to match what we find for other similar areas. Additionally the occupations listed are representative of the education and income levels found herein.



## Visitor Survey Findings and Responses

### 23. What is your home zip code?

#### **New Jersey – 23 (9.6%)**

Barneget  
Bayville  
Dayton  
Fanwood  
Hazlet  
Hillside  
Holmdel  
Howell  
Mahwah  
Middletown  
National Park  
Newton  
Northfield  
**Piscataway (5)**  
Port Monmouth  
South Amboy  
Union City  
Vernon  
West Orange

#### **NEW YORK – 23 (9.6%)**

Albany  
Alexander  
Ballston Spa  
Brentwood  
Brooklyn  
Buffalo  
Carmel  
East Norwich  
Flushing (2)  
Freeport  
Lake Katrine  
Madrid  
Manorville  
Potsdam  
Saratoga Springs  
Silver Creek  
Staten Island  
Tivoli  
Troy  
Wantagh  
Yonkers (2)

#### **Pennsylvania – 16 6.6%**

Bensalem  
Blairsville  
Clinton  
Conestoga  
Duncannon  
Freedom  
Media  
Monongahela  
Nesquehoning  
New Castle  
North Wales  
Philadelphia  
Phoenixville  
Pittsburgh  
Smethport  
State College

#### **OHIO – 15 (6.25%)**

Austintown  
Columbus  
Dennison  
Enon

Fairborn  
Lisbon  
Mc Donald (2)  
Minster  
Niles  
Orwell  
Pemberville  
Rawson  
Troy  
Wooster

#### **VIRGINIA – 14 (5.8%)**

Alexandria (3)  
Ashland  
Fairfax  
Leesburg  
Louisa  
Midlothian  
Mineral  
Richmond  
Springfield  
Sterling  
Warrenton  
Waynesboro  
Alameda  
El Dorado Hills  
Fremont  
Garden Grove  
Mission Viejo  
Napa  
Orange  
Richmond  
San Diego (2)  
San Jacinto  
Santa Maria

#### **MICHIGAN – 10 (4.16%)**

Auburn Hills  
Bay City  
Blissfield  
Detroit (2)  
Flint  
Gladwin  
Grand Rapids  
Standish  
Warren  
Boynton Beach  
Fort Myers  
Gulf Breeze  
Kissimmee  
Mulberry  
Palatka  
Saint Cloud  
Sunrise  
Tampa

#### **TEXAS – 9 (3.75%)**

Austin  
Brackettville  
Carrollton  
Dallas (2)  
Horseshoe Bay  
Lone Star  
Shelbyville  
Willis

#### **MARYLAND – 8 (3.33%)**

Baltimore (2)  
Damascus  
Edgewood  
Eldersburg  
Gaithersburg  
Owings Mills  
Rawlings

#### **CONNECTICUT – 7 (2.9%)**

Danbury  
Gales Ferry  
Monroe  
Somers

Trumbull (2)  
Willington

#### **GEORGIA – 7 (2.9%)**

Carrollton  
Decatur  
Felton  
Macon  
Senoia  
Wrens  
Wrens

#### **MISSOURI – 7 (2.9%)**

Arnold  
Joplin  
Saint Louis (2)  
Seneca  
Springfield  
Van Buren

#### **ILLINOIS – 6 (2.5%)**

Aurora  
Champaign  
Elgin  
Oblong  
Rock Falls  
Springfield

#### **North Carolina – 5 (2%)**

Concord  
Hertford  
Lucama  
Wilmington  
Winston Salem

#### **ARIZONA – 4 (1.6%)**

Benson  
Mesa  
Sun City  
Sun City West

#### **INDIANA – 4 (1.6%)**

Demotte  
Lowell  
Valparaiso  
Winamac

#### **Massachusetts – 4 (1.6%)**

Boston  
Boston  
Dracut  
West Yarmouth

#### **NEW MEXICO – 4 (1.6%)**

Alamogordo

#### **Albuquerque (3)**

#### **Rhode Island – 4 (1.6%)**

Cranston  
Cranston

Newport

Pawtucket

#### **TENNESSEE – 4 (1.6%)**

Ardmore  
Franklin  
Memphis

Murfreesboro

#### **WEST VIRGINIA – 4 (1.6%)**

Beckley

Frametown

McMechen

Morgantown

#### **LOUISIANA – 3 (1.25%)**

Bourg

New Roads

Welsh

#### **MAINE – 3 (1.25%)**

Auburn

Kennebunk

North Berwick

#### **MISSISSIPPI – 3 (1.25%)**

Columbus

Gautier

Ocean Springs

#### **COLORADO – 2 (.8%)**

Durango

Fairplay

#### **DELAWARE – 2 (.8%)**

Bear

Newark

#### **KANSAS – 2 (.8%)**

Galena

Leavenworth

#### **MINNESOTA – 2 (.8%)**

Mora

Zumbrota

#### **MONTANA – 2 (.8%)**

Clancy

Sidney

#### **OKLAHOMA – 2 (.8%)**

Arkoma

Tulsa

#### **ALABAMA – 1 (.4%)**

Mobile

#### **IOWA – 1 (.4%)**

Muscatine

#### **KENTUCKY – 1 (.4%)**

Berea

Paris

#### **NEBRASKA – 1 (.4%)**

Blair

#### **New Hampshire – 1 (.4%)**

Hudson

#### **OREGON – 1 (.4%)**

Albany

#### **South Carolina – 2 (.8%)**

Aiken

Clover

#### **WASHINGTON – 1 (.4%)**

Spokane

#### **WISCONSIN – 1 (.4%)**

Neenah

#### **WYOMING – 1 (.4%)**

Bitter Creek

## **Visitor Survey Findings and Responses**

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**24. Which category is closest to your total family income? (circle one)**

Less than \$20,000	8.78%
<b>\$20,000 - \$39,999</b>	<b>21.95%</b>
<b>\$40,000 - \$59,999</b>	<b>27.32%</b>
<b>\$60,000 - \$79,999</b>	<b>14.63%</b>
\$80,000 - \$99,999	12.20%
\$100,000 - \$119,999	6.34%
\$120,000 - \$139,999	1.95%
\$140,000 +	6.83%
No response	14.15%

The income reported by these respondents reflects their relatively high education level, and matches the findings from state and regional research studies. This data also concurs with the responses regarding education and occupation found in this report.

**25. In your opinion, what source of information most influences your travel decisions? Please rate the following on a five point scale where 1 reflects no influence and 5 reflects a major influence. (Please circle the appropriate number next to each category.) The TOP FIVE responses are in bold.**

<b>Advertising – Magazines</b>	<b>3.51</b>
<b>Brochures in Welcome Centers</b>	<b>3.47</b>
<b>Advertising – Newspapers</b>	<b>3.08</b>
<b>Friends and Relatives</b>	<b>3.07</b>
<b>Advertising – Newspaper advertising inserts</b>	<b>3.05</b>
Advertising – Television	3.00
Internet	2.80
Other	2.48
Advertising – Radio	2.33

The responses here match what we find in state and national data. Also see Travel Industry of America (TIA) data under question #7 in this document. The low rating of the Internet is somewhat surprising and can partially be explained as consistent with the age and gender demographic found in the survey response. However, this percentage will be dramatically increasing every year as consumers become more adept at using the Internet for travel planning.

## **Visitor Survey Findings and Responses**

### **26. What is your favorite magazine? (specify)**

<b>SOUTHERN LIVING (12)</b>	<b>FIRST (2)</b>
<b>READERS DIGEST (11)</b>	<b>FIRST FOR WOMEN</b>
<b>PEOPLE (8)</b>	<b>FORBES</b>
<b>NATIONAL GEOGRAPHIC (7)</b>	<b>GEAR</b>
<b>NEWSWEEK (7)</b>	<b>GOLF DIGEST</b>
<b>TIME (7)</b>	<b>GOLF MAGAZINE</b>
<b>GOOD HOUSE KEEPING (6)</b>	<b>GUIDE POSTS (2)</b>
<b>TRAVEL (6)</b>	<b>GUNS &amp; AMMO</b>
<b>LADIES HOME JOURNAL (5)</b>	<b>HEALTH (2)</b>
<b>SPORTS ILLUSTRATED (5)</b>	<b>HOME &amp; AWAY BY AAA</b>
<b>US NEWS &amp; WORLD REPORT (4)</b>	<b>HOME &amp; GARDENS</b>
<b>CIVIL WAR TIMES ILLUSTRATED (4)</b>	<b>HOT ROD</b>
<b>CONDE NAST TRAVELER (4)</b>	<b>HOUSEKEEPING</b>
<b>COSMOPOLITAN (4)</b>	<b>KIPLINGERS</b>
<b>COUNTRY LIVING (4)</b>	<b>LIFE</b>
<b>SMITHSONIAN (4)</b>	<b>MARTHA STEWART LIVING</b>
<b>BETTER HOMES &amp; GARDENS (3)</b>	<b>MENS HEALTH</b>
<b>BUSINESS WEEK (3)</b>	<b>MILITARY HISTORY</b>
<b>COUNTRY (3)</b>	<b>MODERN MATURITY</b>
<b>FAMILY CIRCLE (3)</b>	<b>MONEY MAGAZINE (2)</b>
<b>FROMMERS BUDGET TRAVEL (3)</b>	<b>MORE</b>
<b>HOUSE BEAUTIFUL (3)</b>	<b>MOSTLY CULTURAL &amp; TRAVEL</b>
<b>MCCALL'S (3)</b>	<b>MOTOR HOME</b>
<b>WOMANS DAY (3)</b>	<b>NATIONAL EXAMINER</b>
<b>WOMEN'S WORLD (3)</b>	<b>NATIONAL GEOGRAPHIC TRAVELER</b>
<b>AMERICAN CIVIL WAR</b>	<b>NEW YORKER</b>
<b>AMERICAN HERITAGE</b>	<b>OLD HOUSE JOURNAL</b>
<b>AMERICAN HUNTER</b>	<b>OPRAH (2)</b>
<b>AMERICA'S CIVIL WAR</b>	<b>OUTDOOR PHOTOGRAPHY</b>
<b>ANTIQUE TRADER</b>	<b>PARENTING</b>
<b>AOPA PILOT</b>	<b>PLAYBOY</b>
<b>ARCHITECTURAL DIGEST</b>	<b>POPULAR MECHANICS</b>
<b>AUGUSTA CHRONICLE (2)</b>	<b>PREVENTION</b>
<b>BIOGRAPHY (2)</b>	<b>RCI - ENDLESS VACATION</b>
<b>BIRDS &amp; BLOOMS</b>	<b>REDBOOK</b>
<b>BLUE &amp; GRAY CIVIL WAR PERIODICAL</b>	<b>REMINISCE (2)</b>
<b>BLUE RIDGE COUNTY</b>	<b>SHOOTER</b>
<b>BON APPETITE</b>	<b>SPORTS</b>
<b>CHIRSMIA</b>	<b>SUNSET (2)</b>
<b>COASTAL LIVING (2)</b>	<b>THE ECONOMIST</b>
<b>COLONIAL HOMES</b>	<b>TODAYS COLLECTOR</b>
<b>CONNECTICUT MAGAZINE</b>	<b>TRAVEL AMERICA (2)</b>
<b>CONSUMER REPORTS</b>	<b>TRAVEL HOLIDAY</b>
<b>COOKING LIGHT</b>	<b>TV GUIDE</b>
<b>COUNTRY WOMAN (2)</b>	<b>VARIOUS TRAVEL MAGAZINES</b>
<b>CRUISE TRAVEL</b>	<b>VIBE</b>
<b>DUCKS UNLIMITED</b>	<b>VICTORIA (2)</b>
<b>EBONY</b>	<b>WOODWORKER</b>
<b>ENTERTAINMENT ONES</b>	<b>WORLD MAGAZINE</b>
<b>ESSENCE</b>	<b>WORTH</b>
<b>FAMILY FUN</b>	<b>YANKEE</b>